



change | coordination | adaptation
the big picture



what do we see ?



the new **face** of MoCo



demographic change **crosses** service boundaries





focus on 3 themes



focus on 3 themes

the **drivers** of change



focus on 3 themes

the drivers of change
coordinated thought



focus on 3 themes

the drivers of change
coordinated thought

adapting



focus on 3 themes

the **drivers** of change





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mobility - new residents 2007 - 10

- 2 % drop in foreign immigration
- 6 % drop in moving within the county
- 5 % increase in moves from other states
 - 1st increase in a decade
- 18 - 24 yr olds + 18%
- 25 to 34 yr olds
 - 30 % of new residents (19,880)
 - 1/5 of foreign arrivals
 - 1/3 of in state & out of state arrivals





age change

	% change 2010 - 30	% of total population	% of total change
0 - 19	13 %	24 %	21 %
20 - 29	15 %	11 %	10 %
30 - 44	25 %	22 %	30 %
45 - 64	- 3 %	24 %	- 5 %
65+	63 %	17 %	44 %



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age groups

36 % increase in **adult** children living with parents
by 2030 all **boomers** will be seniors
an elderly person lives in 1 of every 4 households





age change - minority population

higher proportion of minorities < 45 yrs

	% of age group that is minority	% change 2000 - 10
0 - 19	59 %	34 %
20 - 29	60 %	30 %
30 - 45	59 %	24 %
46 - 64	42 %	66 %
65 +	31 %	82 %



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business change - 05 to 09

loss of 414 businesses - 1.5 %
67 % had < 4 employees
93 % had < 20 employees

500+ employee businesses gained



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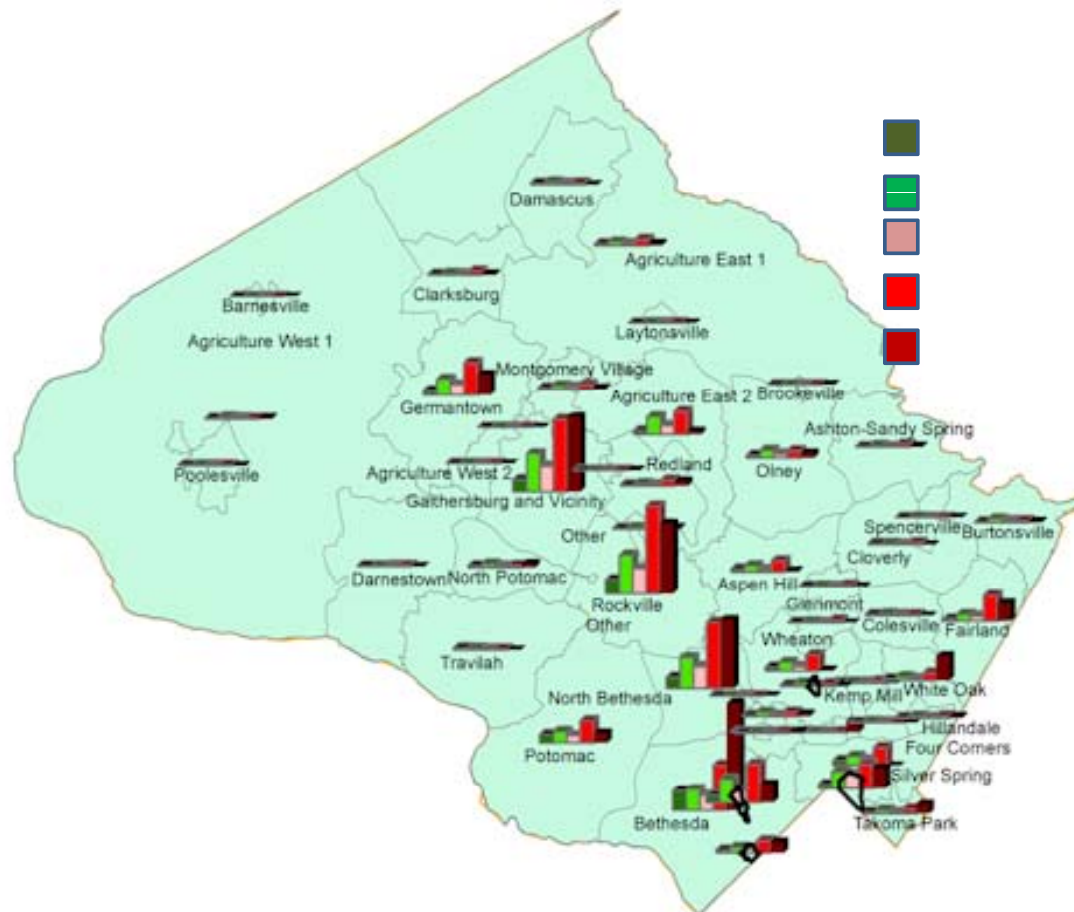


business change - 05 to 09

business	net gain loss	% with < 4 employees
construction	- 252	52 %
retail	- 214	73 %
real estate	- 170	71 %
management	+ 198	85 %
health care	+ 221	40 %



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minority owned business growth 2002 - 07

	# of businesses	% change
asian	+ 3,168	29 %
hispanic	+ 4,168	56 %
<u>black</u>	<u>+ 2,931</u>	<u>26 %</u>
total	10,267	35 %
non minority	+ 6,710	10%



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minority owned businesses - change in jobs

	# of jobs	% change
asian	+ 7,865	34%
hispanic	+ 6,066	49%
black	<u>+ 5,662</u>	<u>33%</u>
	19,593	37 %
non minority	+ 28,434	7 %



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unemployment
age

	2000	2005	2007	2010
16 to 19	14 %	21%	11 %	24 %
20 to 24	7%	10 %	7 %	14 %
25 to 44	3%	4 %	4 %	6 %
45 to 54	2%	3 %	3 %	5 %
55 to 64	2%	2 %	2 %	6 %



11 % of the workforce worked here (est)
90% of all new jobs
1 million hired each yr

Can't Afford an Office? Rent a Desk for \$275

Long Popular With Tech Start-Ups, Shared Workspaces Grow in Popularity as Workers Seek Affordable Facilities

By EMILY GLAZER

Forget privacy. Shared workspaces are the latest trend in office space.

The offices, set up in a variety of ways but emphasizing open space and the ability to rent a single desk, are also known as co-working spaces. Such offices have long been popular with technology start-ups in the San Francisco Bay Area looking for cheap space, but as the latest tech wave rises, shared workspaces are popping up in cities around the country.

Besides the cost advantages, entrepreneurs in technology and other fields say they like co-working spaces because their open floor plans boost collaboration, offer more flexibility on leases and can even help land investors.

"Nowadays with the shared workspaces you don't need to buy furniture, you don't need to set up Internet, you don't need to sign a long-term lease," said Saeed Amidi, founder and chief executive of Plug and Play Tech Center, a co-working space in

square foot co-working space and educational center that opened this past January in New York, are filled, according to the company.

Office spaces amenable to co-sharing are proving to be more popular and lucrative than traditional Dilbert-like offices both for established companies looking to change their atmospheres and companies hosting the spaces for start-ups. The total vacancy for a "creative" space with open floor plans ideal for co-working was 2.54% in San Francisco in July, and the asking rent ranged from \$32 to \$53 per square foot per year. Meanwhile, more "historical" spaces with closed-door offices that lack open space had a total vacancy of 10.55%, while the asking rent ranged from \$21 to \$36 per square foot per year, according to commercial listing broker The CAC Group.

Owners of stodgier office spaces are tearing up their floor plans to chase the market. Earlier this year, a building at 115 Sansome St., in downtown San Francisco, started remodeling for a more flexible layout to appeal to high-tech start-ups.



Workers share desk space at General Assembly, a New York co-working space that opened in January.

start-up Odiago use its space for free. In return, Odiago engineers offer Atlassian their expertise in open source software. "It's a full on win-win," said Jay Simons, Atlassian's president. "We take our people and basically embed them in [Odiago's] team.... the best way to learn is to sit next to each other."

The emphasis on learning has been such a draw at some workspaces that they organize workshops or demonstrations of the latest technologies. General Assembly hosts lectures regularly in addition to events such as a recent start-up demo night. Its layout includes a communal area with large, cushioned couches and industrial wooden tables in addition to breakout rooms, small phone booths or even coocon-type seating for privacy.

Since the action is growing at co-working spaces, investors are also hanging out there more. At Plug and Play, angel investors, including Sand Hill Angels, Band of Angels and The Angels' Forum, typically visit every Monday afternoon to review the business plans of start-ups.

More established venture capitalists including Sequoia, Menlo

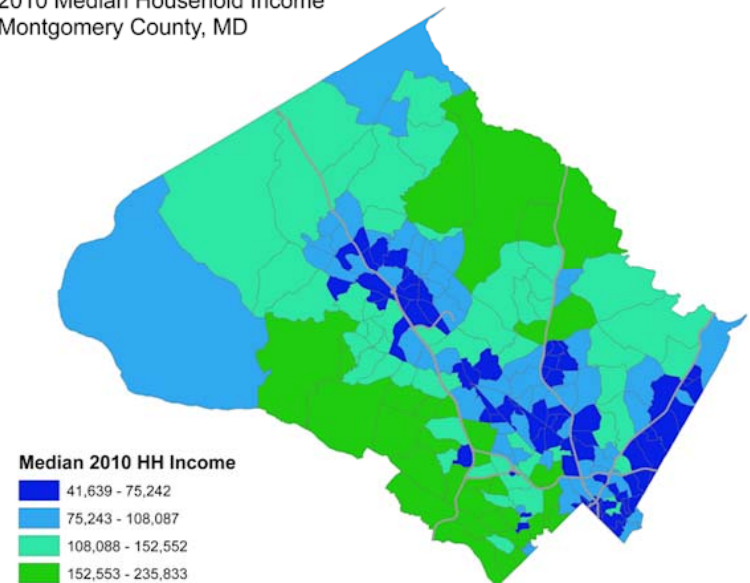
building. Workers pay \$650 to \$1,600 there's an accountant right there;



median income - over 10 yrs

	% change	value
singles	- 12 %	\$ 54,500
owners	+ 1 %	\$115,700
renters	- 9 %	\$ 53,400
black	- 10 %	\$ 60,000
asian	+ 8 %	\$ 98,300
hispanics	+ 4 %	\$ 65,300
whites	+ 3 %	\$109,700

2010 Median Household Income
Montgomery County, MD



2006-2010 American Community Survey, U.S. Census

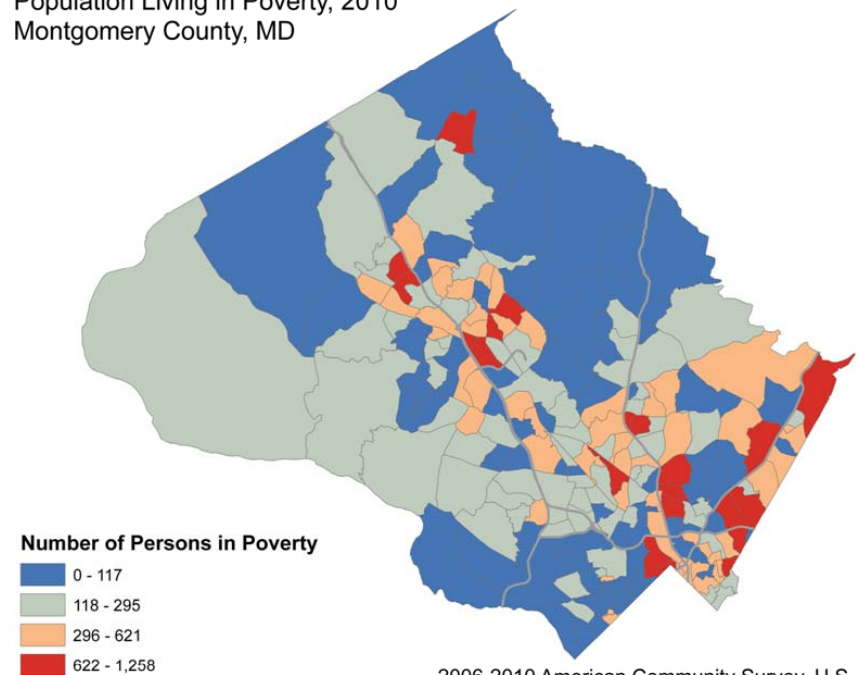


persons in poverty

12 % for hispanics
16 % for blacks
8 % for asians
4 % for whites
34 % for single moms

increased by 59 % in 10 yrs

Population Living in Poverty, 2010
Montgomery County, MD



2006-2010 American Community Survey, U.S. Census



social network infrastructure

ratio of poor residents to providers

moco	357 persons to each non profit
fairfax	498
prince georges	729
prince william	1,338
bethesda	79





non-profit **revenues** per poor person

non profit service sector per capita program revenues

	substance abuse	mental health	employment services	food assist	human services
Montgomery	\$54	\$414	\$101	\$101	\$627
Prince George's	\$52	\$ 10	\$645	\$ 16	\$189
Fairfax	\$49	\$ 2	\$293	\$ 8	\$652
Prince William	\$ 0	\$ 5	\$ 0	\$ 6	\$580





family size

	average family size	# of births 2010
hispanics	3.95	3,505
asians	2.43	2,112
blacks	3.23	2,761
whites	3.04	<u>4,882</u>
		13,273 births





PLACES ADDING MOST NEW RESIDENTS SINCE 2000				
Planning Place	2000	2010	Change	Percent Change
Germantown	66,440	86,395	19,955	30.0%
Rockville	47,399	61,209	13,810	29.1%
Clarksburg	2,371	13,766	11,395	480.6%
Gaithersburg & Vicinity	60,265	68,841	8,576	14.2%
Wheaton	52,236	57,798	5,562	10.6%
Fairland	29,858	35,242	5,384	18.0%
North Bethesda	38,610	43,828	5,218	13.5%
Bethesda	86,100	90,499	4,399	5.1%
Silver Spring	68,137	71,452	3,315	4.9%
Other	45,468	48,123	2,655	5.8%
MONTGOMERY COUNTY	873,112	971,777	98,665	11.3%



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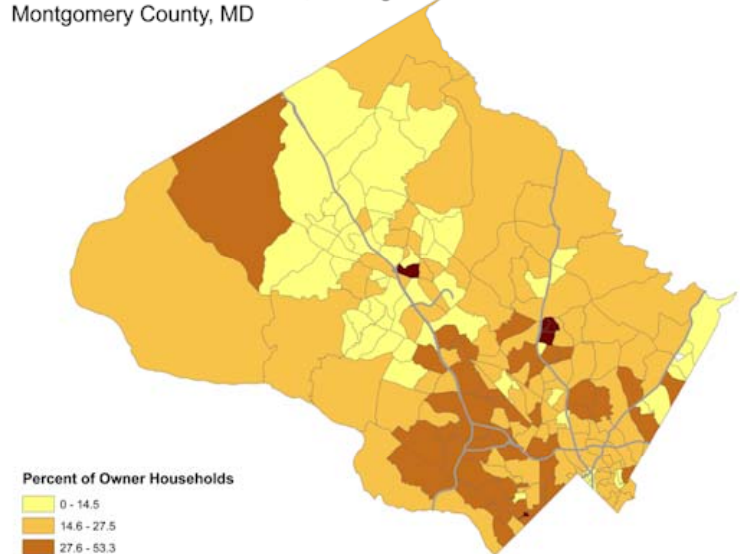
Knowledge

housing turnover | school projections

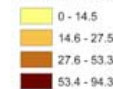
1/3 of housing stock sold in 10 yrs
future enrollment

63 % of seniors own homes

Percent of Owner Households, HH'r Age 65+
Montgomery County, MD

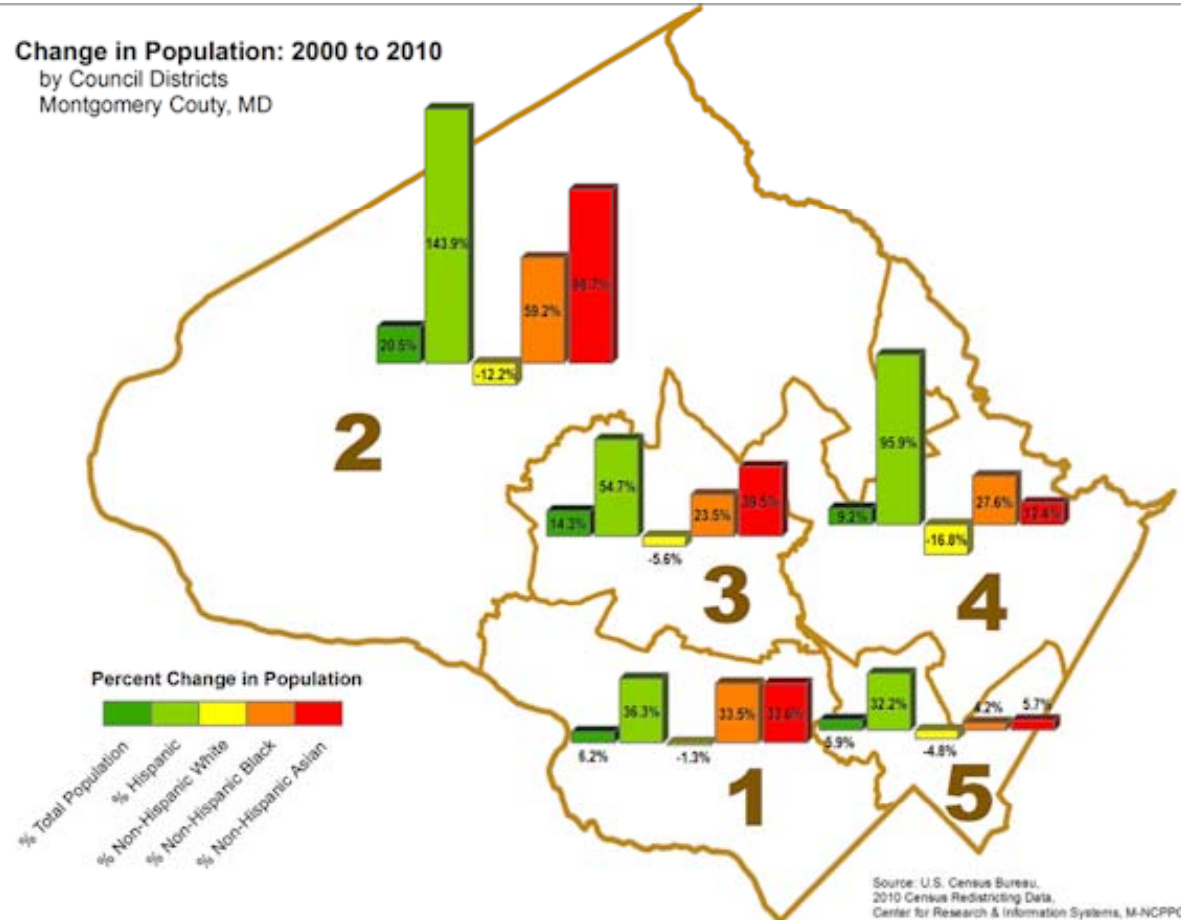


Percent of Owner Households



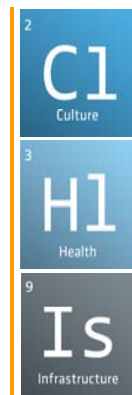
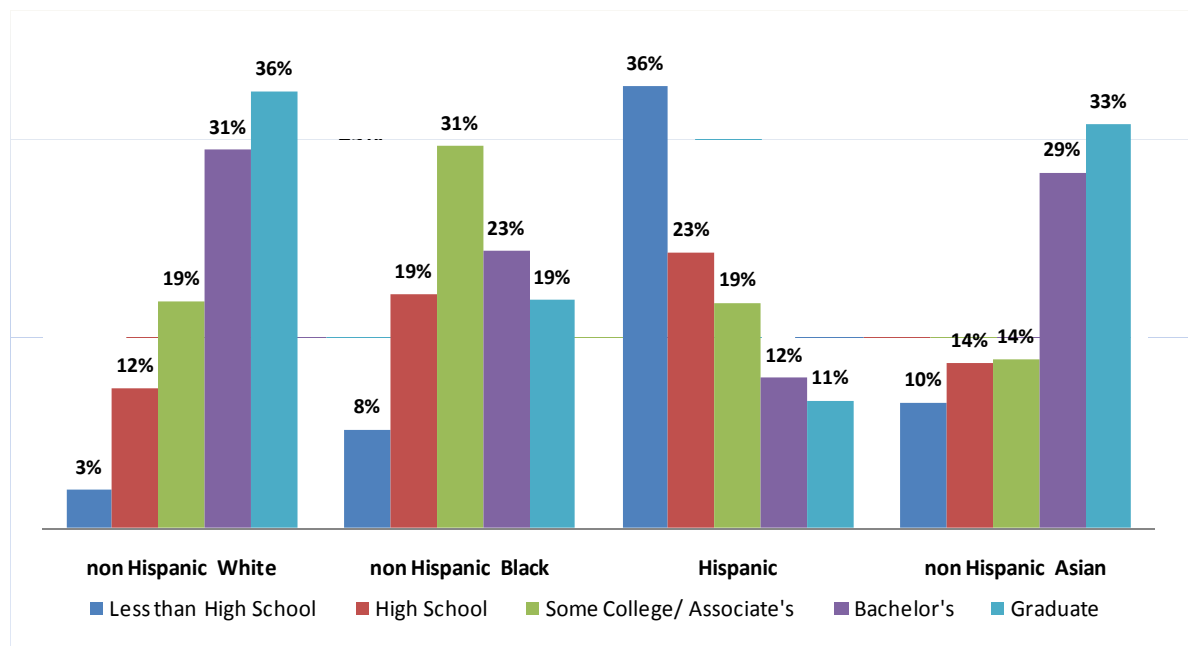
2006-2010 American Community Survey, U.S. Census

Change in Population: 2000 to 2010
by Council Districts
Montgomery County, MD



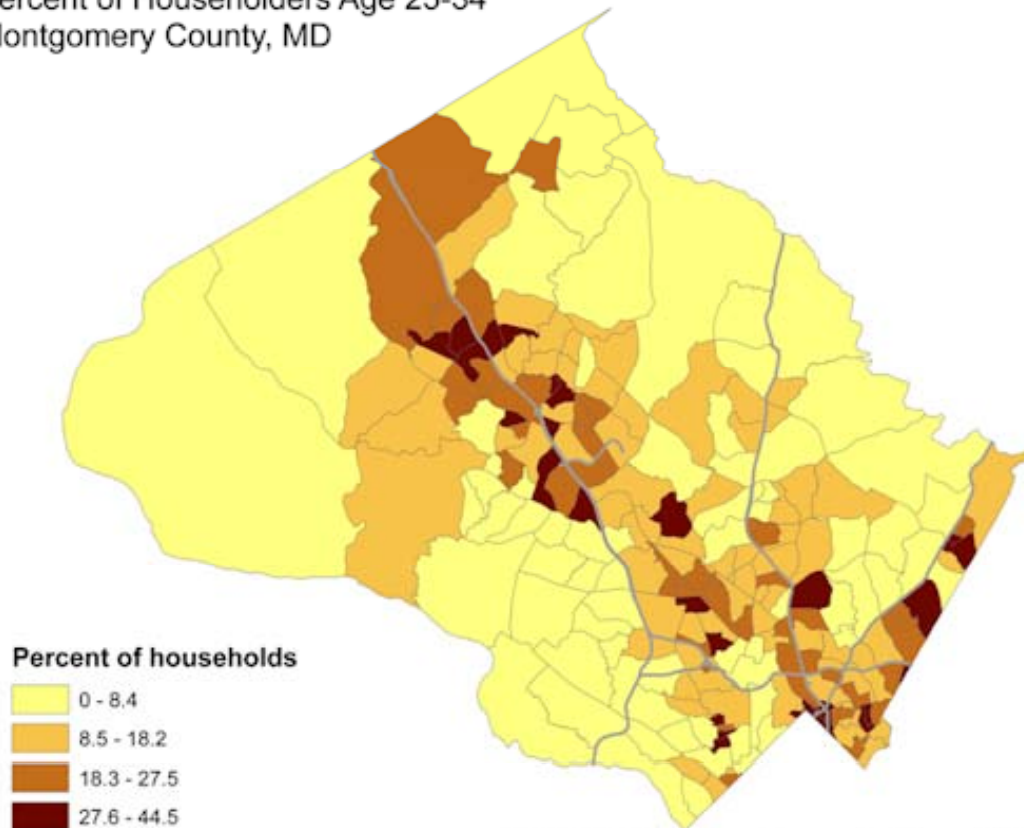


education - foreign born residents
 24 % have an advanced degree
 19 % lack high school graduation





Percent of Householders Age 25-34
Montgomery County, MD



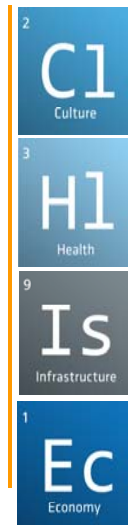
2006-2010 American Community Survey, U.S. Census





national trends - 1980 - 2020

working age white population will drop from 82 % to 63 %
minority workers will double from 18 % to 37 %
highest age white workers will balloon retirement rolls
largest addition to workforce has lowest education levels



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9
Is
Infrastructure



2 Cl Culture	7 Kn Knowledge
3 Hl Health	1 Ec Economy
4 Fd Food	

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changing client needs - economy driven

increase in food assistance
employment - expired ui
domestic violence
utility payments
mortgage | rent
medical



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adults 65 + yrs

where are the largest increases

germantown	179 %
olney	152 %
silver spring	116 %
gaithersburg	98 %
kensington / wheaton	50 %
rockville	39 %



9

Is

Infrastructure

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1 Ec Economy	7 Kn Knowledge
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6 Er Energy	

37 % of owners
44 % of renters

% of Persons with Homeowner Cost > 30% of Income

% of Homeowners spending > 30% of HH income on housing

Color	Percentage Range
Light Yellow	10 - 13.99
Light Orange	14 - 17.99
Orange	18 - 22.99
Dark Orange/Brown	23 - 35

Map Labels: Poolesville, Damascus, Olney, Gaithersburg, Germantown, Upper Rock Creek, Gaithersburg City, Darnestown, Rockville, Aspen Hill, Cloverly, Fairland, Travilah, Potomac/Cabin John, North Bethesda, Kensington/Wheaton, Colesville, Silver Spring, Bethesda/Chevy Chase, Takoma Park, Camp Hill & Corners.

Regional View of Montgomery County, MD: Shows the county's location relative to Virginia (VA), District of Columbia (DC), and Pennsylvania (PA).

Scale: 0 to 5 miles.

Source: Census Update Survey (2008)

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renting vs owning

86 % of 15 to 24 yr old households rent
63 % 25 to 34 yr
37 % 35 to 44 yr
23 % senior

transient workforce



9

IS
Infrastructure

renting vs owning

minorities will be the majority renters by 2020
demand for child friendly apartments
80% of new units over 20 yrs will be multi

A Market Builds for Single-Family Rentals

Private-Equity Fund GI Partners Is Investing in Waypoint, Which Buys Foreclosed Homes and Then Rents Them Out

By Nick Timiraos

A private-equity fund that generated big profits by scooping up empty data centers after the technology-stock bust in 2000 is now making a big bet on foreclosed homes.

The fund, **GI Partners** in Menlo Park, Calif., plans to announce on Wednesday a \$250 million investment in **Waypoint Real Estate Group**, an Oakland-based company that buys foreclosed homes at discounts and rents them out to tenants. The investment is among the largest to date by an institutional investor in the nascent single-family rental space.

Richard Magnuson, managing director of GI Partners, said the private-equity fund could eventually expand its investment to \$1 billion over the next two years if the initial round is successful.



Waypoint purchased this Antioch, Calif., home for \$140,000 and is marketing the rental at \$2,049 a month.

becoming one of the largest rently, Waypoint operates in the turn accelerated in 2007. But this

Institutional investors have largely been bystanders because they haven't been willing to develop the complex infrastructure needed to manage hundreds or thousands of scattered rental properties.

Fannie Mae, Freddie Mac, and other foreclosed-property sellers also have frustrated these investors by resisting bulk sales, which require sellers to take deep discounts, hampering their efforts to scale up.

Single-family rental investment represents the fastest growing real-estate asset class, said Waypoint co-founder Colin Wiel. "But today it's all done by mom-and-pop owners," he said. "It's the industry that nobody thinks about because no large companies have entered into it."

Waypoint buys about a half-dozen houses daily and uses a technology-based model that al-

lowers the cost of foreclosed homes. White House officials and other U.S. policy makers are looking at rental conversions to help clear a glut of foreclosed homes. A 26-page paper from the Federal Reserve last week offered detailed outlines of how such programs might work, and federal agencies and mortgage titans Fannie and Freddie could announce pilot programs within weeks.

Such rental conversions are appealing because the supply of potential foreclosures is enormous. Banks took back about 600,000 homes in 2010 and 1.1 million last year, but those figures could rise to 1.8 million in each of the next two years, ac-

1 Ec Economy	7 Kn Knowledge
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loans since the crisis - nationally

62 % less borrowing by hispanics & blacks
17 % less by whites
asians equal



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3 themes

adapting



adapting

agencies	population growth	diversity	aging	household income
housing	affordable housing	community need based revitalization	accessiblity	foreclosure rent assistance
recreation	gen x & y needs	varying needs	senior centres	service needs fees
libraries	service delivery	range of services method of delivery	large print media new technology training in new media	increased use
education	capital projects	english learning high school equivalency	continuiuing ed	training

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adapting

shifting demographics underscore the need for policies creating **balanced** service delivery linking housing, health, transit, jobs, training & education, to ensure all residents have equal **access** to **opportunity**

diversity is the **cornerstone** for success

success

age

acceptance

opportunity

achievement

access for all

recreation

ethnicity

gender

affordability

housing

mobility

equality

employment

respect

the future

sustainability

education

equity

knowledge

self esteem

sustainability

jobs

transit

health

security